

### Recording Supplier Conversations Overview

Cardinal allows you to track ongoing discussions and conversations with supplier contacts. You can log the details about procurement, invoice, and payment issues that you are trying to resolve as well as document supplier inquiries by using the **Supplier Conversation** page.

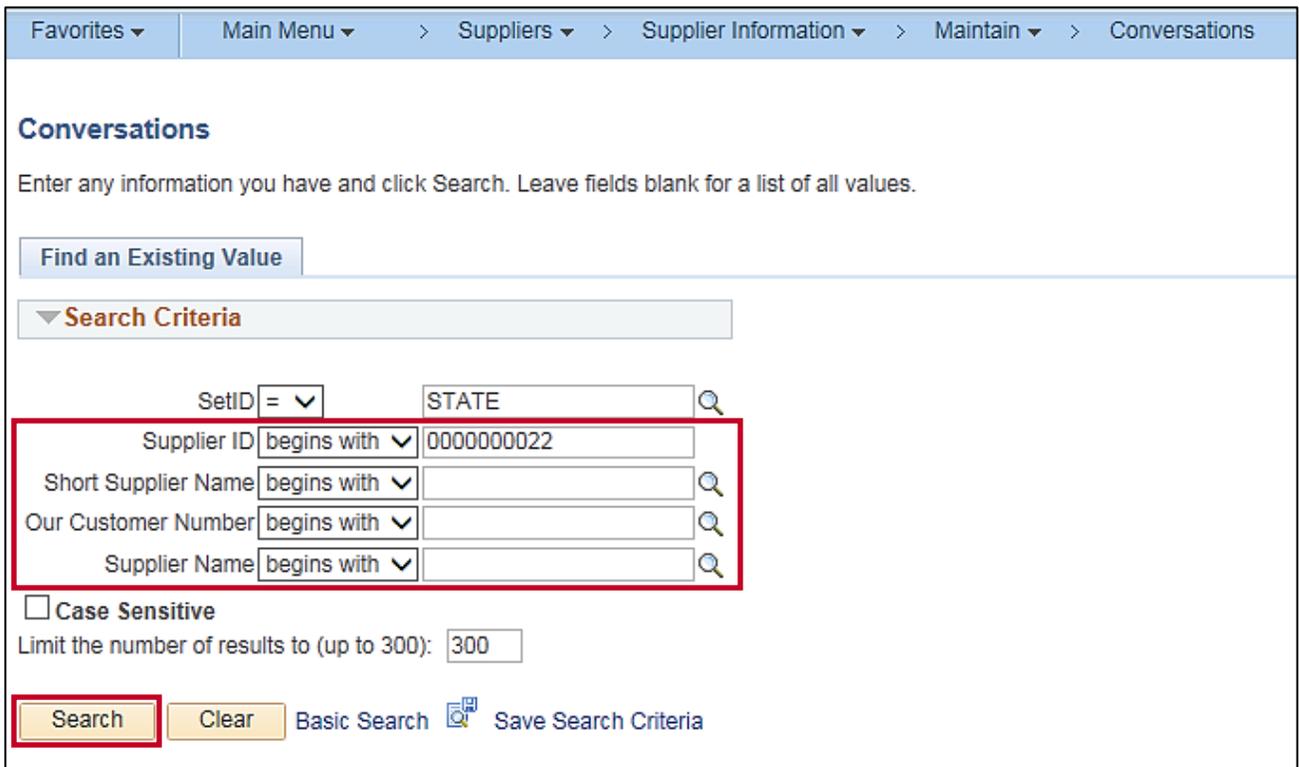
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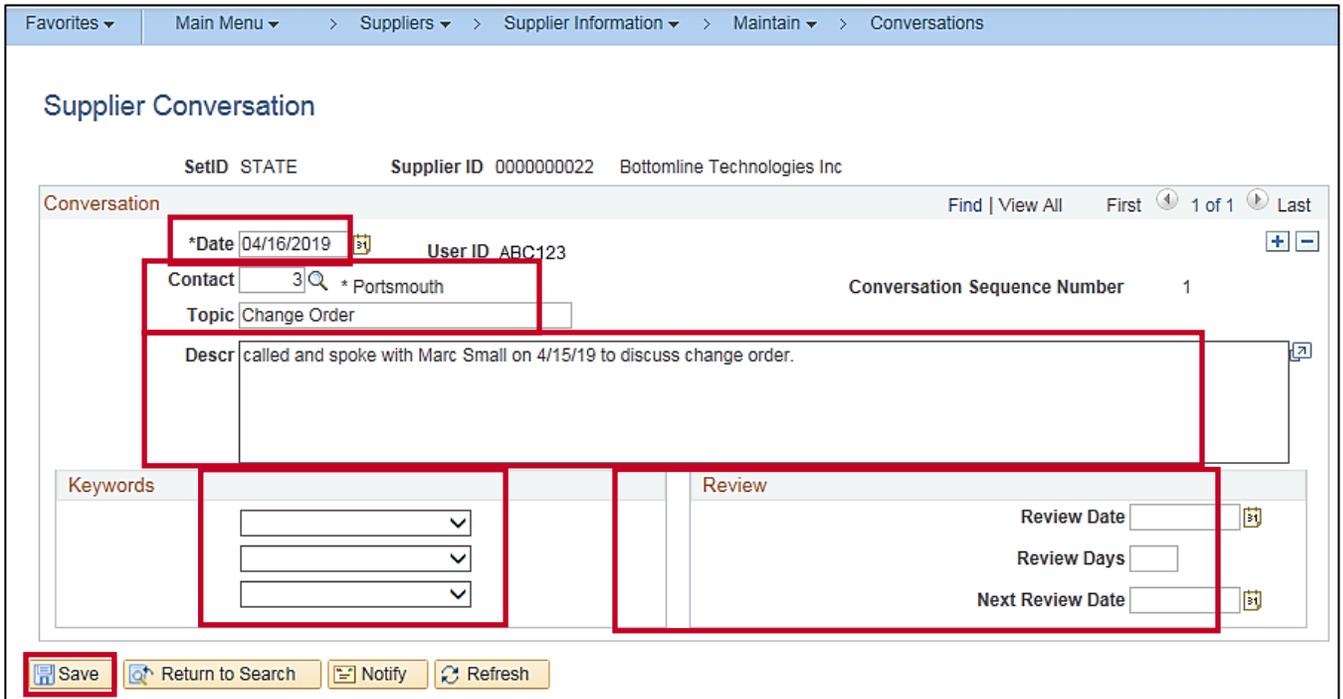
### Record a Supplier Conversation

1. Navigate to the **Conversations** page using the following path:

**Main Menu > Suppliers > Supplier Information > Maintain > Conversations**



2. The **Conversations** page displays. Enter search criteria for the desired supplier.
3. Click the **Search** button.
4. If a **Search Results** list appears, click the line to select the desired supplier. The **Supplier Conversation** page appears.



Supplier Conversation

SetID STATE Supplier ID 000000022 Bottomline Technologies Inc

Conversation Find | View All First 1 of 1 Last

\*Date 04/16/2019 User ID ABC123

Contact 3 \*Portsmouth Conversation Sequence Number 1

Topic Change Order

Descr called and spoke with Marc Small on 4/15/19 to discuss change order.

Keywords

Review

Review Date

Review Days

Next Review Date

Save Return to Search Notify Refresh

5. In the **Contact** field, enter the ID for the supplier contact with whom you spoke. (Use the **Look Up Contact** icon if needed.)
6. In the **Topic** field, enter a brief (up to 30 characters) description of the topic you discussed if desired.
7. In the **Descr** field, enter a detailed description of the conversation. Make sure to include any agreements or conclusions that you reached.
8. In the **Keywords** section, select one or more keywords from the drop-down list(s) to identify the conversation if desired. This makes it easier to locate the conversation later.
9. If you want to review the conversation later (e.g., to follow up with the supplier if needed), complete the fields in the **Review** section as desired. You can enter a **Review Date**, the number of **Review Days** from today, and/or a **Next Review Date**.
10. Click the **Save** button.